Microsoft Licensing Guidelines

July 22, 2003

Introduction

On June 13, 2003, OSD issued agency guidance regarding the new Microsoft Select 6.1 agreement. As part of the agreement, agencies will need to decide whether to purchase Software Assurance (SA) for existing or new licenses. SA is a membership program that provides product upgrades among other benefits. Hot fixes and service packs are provided through the regular license and do not require SA. Agencies that do not participate in SA will have to purchase new licenses to upgrade products.

These guidelines provide guidance regarding Microsoft's new licensing program in the context of Commonwealth enterprise standards. Agencies should consult Marge MacEvitt's email dated June 13, 2003 regarding Microsoft Select 6.1 for details regarding the new Select Agreement such as enrollment guidelines and pricing.

Should agencies purchase Software Assurance (SA)?

SA can be purchased for one or more product pools:

*   Applications
*   Operating Systems
*   Servers

Applications (Office, Project, etc.)
*   If an upgrade to the MS Office Suite is anticipated to occur by the agency within a year, it is recommended that the agency purchase SA.

*   If the agency does not anticipate an upgrade for the next 3 years, it is not recommended that the agency purchase SA.

*   Agencies that are planning an upgrade in the 2 to 3 year timeframe can purchase new licenses for the product.

Rationale: Agencies are likely to do major product upgrades every three years or more, not every year.

Enterprise Standard: The product recommendation according to the current enterprise standards for Office Automation is MS Office 2000 (http://www.mass.gov/itd/spg/publications/standards/archstan.htm). Agencies running prior versions of MS Office should upgrade to the standard.

Operating Systems

- If the agency is purchasing new PCs, it is not recommended that the agency purchase SA.

- If the agency is upgrading their OS to come up to the enterprise standard, it is not recommended that the agency purchase SA.

    Rationale: Large-scale PC purchases usually entail an upgrade of the OS. Even though the OEM OS is not covered under SA, it is not likely the agency will do another major purchase within three years. Likewise, if the agency is upgrading the OS only, it is not likely another OS upgrade will be done within three years. It is also less expensive to simply purchase the new OS license at comparable cost to purchasing SA.

    Enterprise Standard: The current standard for desktop operating systems is MS Windows 2000 Professional and the emerging standard is MS Windows XP (http://www.mass.gov/itd/spg/publications/standards/ArchStan.htm - OperDesktop). Agencies running prior versions of the MS operating system should upgrade to the standard.

Servers (Server and CAL licenses)

- It is not recommended that agencies purchase SA.

    Rationale: Servers are purchased by agencies on an as-needed basis and can be purchased with current server software. In most instances, it is more inexpensive for agencies to simply purchase a new server license than to purchase SA as major upgrades to server software do not happen often enough to warrant SA.

Other Considerations:

- Agencies purchasing SA should decide whether to make a one-time payment or annual payments based on their own budget situation.

- Agencies should refer to Marge MacEvitt's email dated June 13, 2003 regarding Microsoft Select 6.1 for details regarding the new Select Agreement including enrollment and pricing. ITD concurs with OSD that there should not be more than one enrollment per agency to facilitate asset management and meet the volume requirements. Smaller agencies can "pool" their purchases under one enrollment, for example, at the Secretariat level.

What is ITD doing?

- Applications: Currently running MS Office 2000. We have recently upgraded to the Outlook 2002 email client as part of the MassMail environment but will not be upgrading to the full Office 2002 Suite. ITD is planning to test Office 2003 for security and application interoperability when it becomes available. Upon successful testing, the emerging enterprise standard for Office automation will be revised to Office 2003. ITD has not purchased SA.

- OS: Currently running MS Windows 2000. ITD is planning to test Windows XP for security and application interoperability for possible roll out this fiscal year. Upon successful testing, the current and emerging enterprise standards for OS may be revised. ITD has not purchased SA.

- Server/CAL: Currently running Windows 2000 server/CAL and Exchange 2000. We will be testing Windows 2003 Server. ITD has not purchased SA.